

QUOSA INFORMATION MANAGER



QUOSA Information Manager Training Basic Features and Operations

Note: QUOSA and QUOSA Information Manager are Trademarks of QUOSA, INC.



What is QUOSA Information Manager?



- A tool for literature retrieval and management
- Main features:
 - Wraparound channel interface
 - Channels
 - One-click batch retrieval
 - Sync & link with citation manager
 - Easy organization
 - Import tools
 - Search in Results (SIR) and highlighting
 - Annotations
 - Alerts
 - And more ...

Exercises

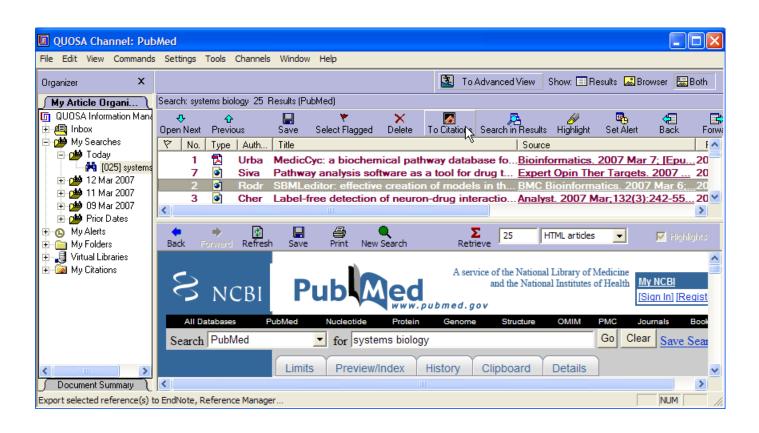


- Ex 1: Retrieving Articles
- Ex 2: Exporting Citations
- Ex 3: Managing Folders/Searches
- Ex 4: Importing PDFs
- Ex 5: Importing Citations
- Ex 6: Annotating Articles and Folders
- Ex 7: Searching in Results
- Ex 8: "Manual" Highlighting
- Ex 9: Setting Search Alert
- Ex 10: Using QUOSA Toolbar



First Set of Exercises: (1) Retrieving Articles and (2) Exporting Citations







Exercise 1: Retrieving Articles



MAIN STEPS:

- 1. Perform search in selected channel (for example, PubMed).
- 2. After search, check individual items or enter total number to retrieve and select format (abstract, PDF, or HTML).
- 3. Click Retrieve button (Σ).
- 4. Do a few more searches and retrievals (using steps #1 3).

- Articles are actually downloaded to your computer.
- Article citations appear in Results pane during download.
- Articles are automatically indexed.
- Articles are automatically highlighted.
- Search is listed under My Searches by date; number retrieved is shown in brackets.
- If selected full-text format not available, next full-text format is attempted; abstracts retrieved if neither full-text is available.



Exercise 2: Exporting Citations



MAIN STEPS:

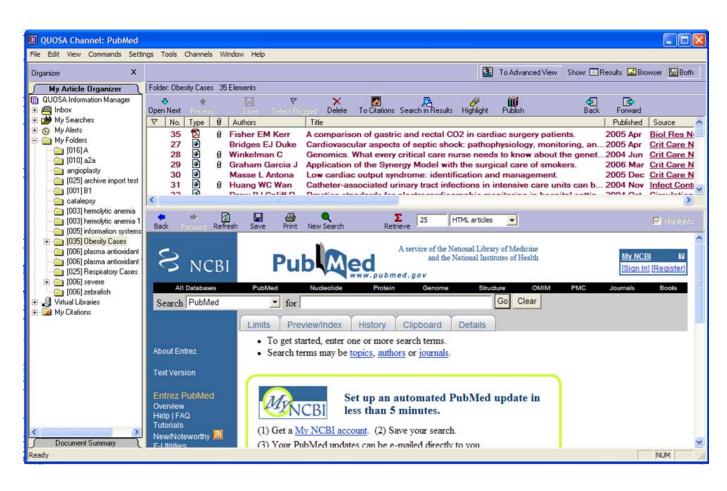
- 1. Select the items to export (click on one, or use Shift key and mouse for contiguous set, or CTRL-A for everything).
- 2. Click the To Citations button (on the Results pane toolbar).
- 3. Select the library/database to export into.
- 4. Open an exported record and check the URL section (EndNote example).

- You can export one citation, many, or all at once.
- QUOSA puts a link in each record back to the article on your computer (including one to the abstract as well).
- If you click on the link, QUOSA opens the article in its Browser pane.
- If you click My Citations, you will see a list in the Results pane of the citations you exported; the most recent are at the top.



QUOSA Interface: Browser, Results, and Organizer Panes











- Purpose: displays article collections in categories, or highlighted excerpts.
- Made up of two tabs:
 - My Article Organizer
 - Inbox
 - My Searches
 - My Alerts
 - My Folders
 - My Citations
 - Document Summary



Browser Pane



- Purpose: displays native search interface, references from a search, or any opened article, abstract, or document.
- It has its own toolbar.

Results Pane

- Purpose: displays articles, abstracts, and documents as they are retrieved <u>or</u> imported, <u>or</u> lists contents of any opened folder, search, or alert.
- It also has its own toolbar.



Exercise 3: Managing Folders/Searches

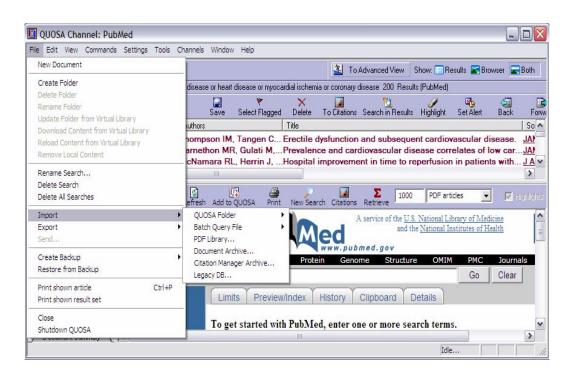


- 1. Select some articles to save, click Save, and select or create a new folder. Repeat this process a few times.
- 2. Right-click on the folder, select New Folder, and create a sub-folder.
- 3. Right-click on My Folder, select New Folder, and create a new main folder.
- 4. Drag and drop articles into any folder.
- 5. Drag/drop folders into other folders to create hierarchy.
- 6. Right-click on a folder to see management options.
- 7. Right-click on a search under My Searches to see management options.



"Importing" Exercise: Import Tools







Exercise 4: Importing PDFs



MAIN STEPS:

- 1. Click File on QUOSA main menu.
- 2. Click Import.
- 3. Click Import PDF Library.
- 4. Complete the *Import PDF Library* dialog. Browser to folder called "PDFs for Import."

- During the import, PDFs will begin to display in the Results pane.
- During the import, QUOSA indexes the PDFs.
- During the import, QUOSA also tries to get the citation information from PubMed; if it cannot, you can right-click on the item in the Results pane and select Edit Properties option, and put in the information manually. If you have the PubMed ID, enter it in the "PubMed Unique Identifier" field and click the Resolve button.
- If you check the Include Subdirectories checkbox, QUOSA will replicate your folder/subfolder structure.



Importing Citations (Library or Database): Just an Overview



MAIN STEPS:

- 1. Export a .txt file of citations from EndNote or RefMan.
- 2. In EndNote, "Output Styles" should be set to "Show All."
- 3. Be sure you are in the PubMed channel.
- 4. Click Tools on the QUOSA main menu.
- 5. Click Process Citation Library/Database.
- 6. Follow the *Import From Citation Manager* wizard.

- Export the .txt file ahead of time (be sure to have "Output Styles" selected for "Show All"); also, create a new library or database.
- During the import, QUOSA tries to retrieve the full-text article for each citation it is importing from the .txt file.
- When the import is completed, you will have the option of exporting the citations to the new library/database.
- If you elect to do the export, QUOSA will add links in the records to any full-text articles it retrieved (as well as a link to the abstract).



Exercise 5: Other Ways to "Import" into QUOSA



MAIN STEPS:

Dragging and dropping single articles/documents into QUOSA:

- 1. From your desktop or a folder, drag an item and drop it into a QUOSA folder.
- 2. Use the *Document Properties* dialog (which pops up) to enter citation information.

Using the Add to QUOSA option to "import" into QUOSA:

- 1. Go to your desktop or a folder, select the items, and right-click.
- 2. Select Add to QUOSA. (Goes to your Inbox right-click and use Edit Properties option to add citation info.)

Go to a website and find/open a page or article. Use the Add to QUOSA button from the QUOSA IE Toolbar. (Goes to your Inbox - right-click and use Edit Properties option to add citation info.)

Use the "Import Document Archive" from File on the main menu and then Import for a mix of document formats and articles. Browse to folder called "Doc Archive for Import."



Exercise 5: Other Ways to "Import" into QUOSA (cont.)



- When using the "Add to QUOSA" option, the item(s) imported into QUOSA are imported into the Inbox in My Article Organizer. After entering the citation information, you can save the item(s) to a folder.
- When using "Import Document Archive," QUOSA also indexes the articles and documents.



Annotating Articles and Folders Exercise: Annotation Tab in *Document Properties*Dialog



Document Propertie	es
Properties Annotation	ns
△ Annotation	
Relevancy Rating	★★★ ☆
Project	Alpha
Collaborator	
Publication	
References	
Related to	
Description	Requirement for Tokyo Conference
⊿ Reviewer	
Name	zenon cuper
Email	zenonc@quosa.com
Date Created	04/10/2008 10:21:52 AM
Date Modified	04/10/2008 10:21:52 AM
1	
	Show All (0) Customize
	OK Cancel Apply



Exercise 6: Annotating Articles and Folders



MAIN STEPS:

To annotate an article:

- 1. Click to open a folder and right-click on an article in the Results pane. (You can select multiple articles and right-click to annotate several articles at one time.)
- 2. Click Edit Properties. Click the Annotation tab.
- 3. Enter one or more annotations.

To annotate a folder:

- 1. Right-click on a folder in My Article Organizer.
- 2. Click Folder Annotations.
- 3. Click Edit.
- 4. Enter one or more annotations (in *Folder Properties* dialog).



Exercise 6: Annotating Articles And Folders (cont.)

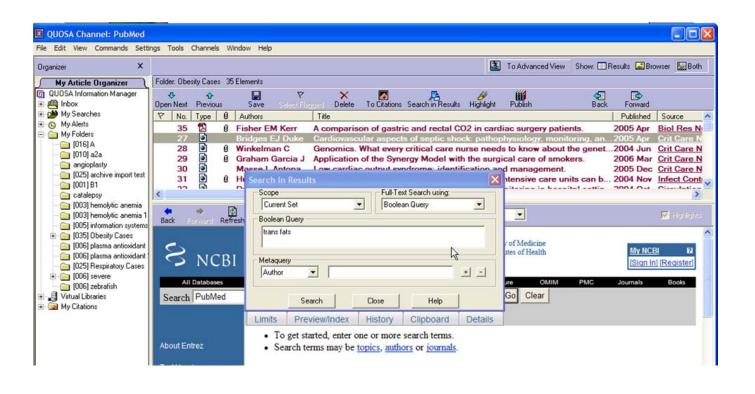


- A paperclip icon signifies an annotated article (in the Results pane). Clicking on the icon will display the annotation.
- With right-click on article, you get "Delete Annotation" option.
- You can display a folder annotation by right-clicking on the folder name, clicking Folder Annotation, and then View.
- You can edit an annotation by right-clicking on the article, selecting Edit Properties, and then the Annotation tab (or click on paperclip icon); or a folder by right-clicking on it, then Folder Annotation, and then Edit. The "Date Modified" field in the Annotation tab will reflect the date of the edit(s).



SIR and "Manual" Highlighting Exercises: Search in Results Dialog







Exercise 7: Searching In Results (SIR)



MAIN STEPS:

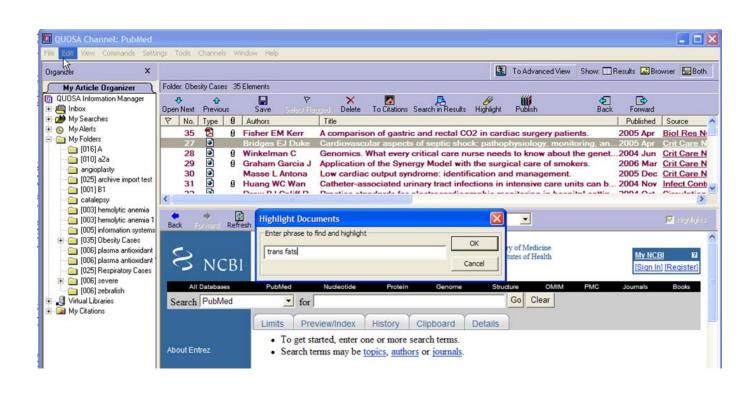
- 1. Click on a search or folder (in the Organizer pane) to start the process.
- 2. Click the Search in Results button on the Results pane toolbar.
- 3. In the Search in Results dialog, specify:
 - Scope
 - Search mode
 - Search expression, and/or
 - Meta-query value(s)

- Scope can range from current set to all searches and folders.
- Boolean searches word-by-word, Regular Expression character-by-character, and Left Truncation by suffix.
- Meta-query values range from citation information to annotation values. (Use quotes for precision.)
- SIR search results are listed under specific search or folder that was being searched when searching current set. All other searches (All Searches, All Folders, and All Searches & Folders are listed under My Searches.)
- Click Help in the dialog for complete instructions.



SIR and "Manual" Highlighting Exercises (cont): Highlight Documents Dialog







Exercise 8: "Manual" Highlighting



MAIN STEPS:

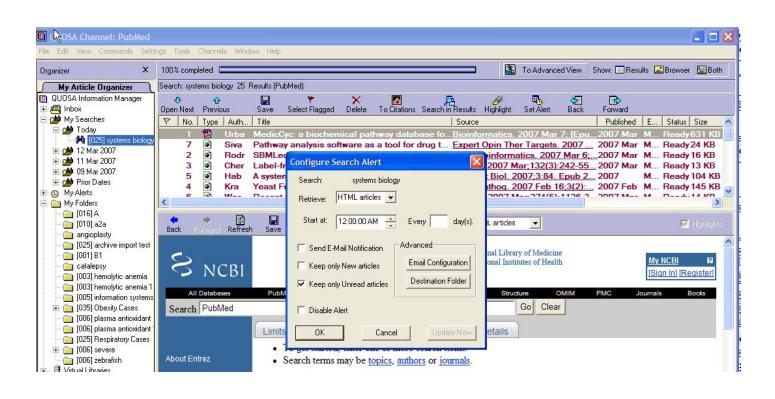
- 1. Click the Highlight button right after your SIR search. The text to highlight will be in the *Highlight Documents* dialog that appears.
- 2. Click OK.
- 3. To see the highlights, open an article (using Open Next/Previous or double-click on the article) in the Results pane, and then click on the Document Summary tab (at bottom of Organizer pane).
- 4. Click on any excerpt in Document Summary tab (QUOSA will scroll to the location of the highlighted passages in the opened article).

- For multiple-term searches, one color is used to highlight complete match (all the terms were found close together) and another for partial match (only one term found).
- QUOSA displays message if article could not be highlighted.
- You can toggle between My Article Organizer and Document Summary.



Setting Search Alert Exercise: Configure Search Alert Dialog







Exercise 9: Setting Search Alerts



MAIN STEPS:

- 1. Right-click on a search (the one you want to configure an alert for).
- 2. Click Configure Alert.
- 3. Complete the *Configure Search Alert* dialog.

- A configured alert automatically repeats a search.
- Check the checkbox Keep only New articles if you want QUOSA to keep only new articles after executing the next scheduled search, or check the checkbox Keep only Unread articles if you want QUOSA to keep those you haven't opened (or uncheck both).
- QUOSA puts the search you configured the alert for under My Alerts as well as any new results (as well as in the "destination" folder if you designated one).
- To edit an alert, click on the alert in My Alerts.
- To stop email notifications, uncheck the Send E-Mail Notification checkbox.
- To stop the alert, check the Disable Alert checkbox.



Exercise 10: Using the QUOSA Toolbar



MAIN STEPS:

- Click Add to QUOSA to add an article or web page you have opened in your browser.
- Click To Retrieve or To Citation when you want to retrieve articles (from PubMed or Ovid) or export citations (this will launch QUOSA).
- From the drop-down menu, select either PubMed or Ovid if you want to search in either one.

- If you have not enabled the Toolbar, go to Settings (on the QUOSA main menu) and click Enable QUOSA Toolbar.
- To disable it, go to Settings and click Disable QUOSA Toolbar.



That's it!



Thank you!